

Pro-Bono Silver Financial Planner

Notes 10/11/2014



Financial education and personalized financial planning can, and does, make a difference for every American that has the opportunity to gain access to a higher level of financial knowledge. Any iterative that intends to distribute financial knowledge to underserved portions of American society will positively affect our communities by allowing more of our friends, neighbors, children and parents to better manage their finances today, and into the future.

In support of non-profit financial planning and financial education, Money Tree Software has produced a Pro-Bono Silver Financial Planner that is free of all cost for use by any and all financial planners, counselors, and educators while offering their professional services without charge for the planning services. The Pro-Bono software was originally developed in coordination with the Financial Planning Association of New York, and is co-branded with both the FPA-NY logo and the Money Tree Logo. Money Tree would like to thank FPA-NY for their long standing commitment to promoting and providing accessible financial planning and education to their entire community.

The Pro-Bono software is for use by any financial professional or educator delivering either one-on-one financial planning, group financial planning, or any kind of financial education where the concepts, calculations, graphics, or dynamic content can assist them in furthering the financial knowledge in our communities.

Money Tree Software is pleased to offer and make available this Pro-Bono financial software to any qualified advisor, educator, or group that has a need. The software is professional, yet easy to learn, and quick to use. It is a highly compliant application, and never connects a rate of return to a particular asset. It is not a sales tool, but rather is designed to inform and educate, with reports and graphics showing where people are financially, what they are doing, and where they are headed. The software, its questionnaire, and its reports are designed to guide and promote a conversation that may ultimately uncover peoples financial values, their goals, and the steps necessary to improve their ability to achieve their own personal versions of success.

The software has a time-limited license, 6 months, after which users have to obtain an updated copy. This is both to ensure ongoing use of current software, but also to prevent permanent use of a Pro-Bono copy of software without affiliation or approval. There is a statement on the report cover, and at the bottom of every page, stating that the report is a pro-bono document, and should be free of charge.

In addition to the planner's or organization's name, the cover page and report footer reads:

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